"Marketing Tips for Success in the HUB Program"

Bottom Line:
Know your market
- How are your products/services being procured
- Who buys your products/services
- Who are the current vendors/contractors
- What are the current prices being paid
HUB Program

• Establish trends
• Utilize at least 3 years of data
• Evaluate which agency spends the most in your area of services or products
• Think outside the box...where do opportunities exist for your business (prime or subcontracting)
• How much money do they have allocated to spend

“Where do I start?”
“How do I find opportunities?”
Statewide Contracts
- Search Statewide Contracts
- Contract Development
- Contract Management
- Contract Review & Delegation (CAT-RAD)
- Texas Multiple Award Schedule (TMAS)
- TXSmartBuy
- Department of Information Resources Contracts

Procurement Resources
- Statewide Procurement Outreach Team
- Publications and Forms
- NIGP Commodity Book
- Search for CMB/HUB Vendors
- Statutes and Procedures
- Grant Management

Vendor Resources
- Vendor Information Center
- Centralized Minority Business List (CMBL)
- Historically Underserved Business (HUB)
- Modify CMBL/HUB Profile
- Electronic State Business Daily (ESBD)

Government Resources
- Vendor Performance Tracking System (VPTS)
- Cooperative Purchasing (CO-OP)
- State Payment Card
- State Travel Management
- State Mail Services
- Vending and Fleet Management

Training and Certification
- Purchasing/Procurement (CTP/CTPM)
- Contract Manager (CTCM)
- Directory of Active Certifications
- Continuing Education and Events
- Webinar Training for Governing Bodies
- SO1681

SB20
- Centralized State Purchasing Study
- State Agency Contract Management Procedures
- LABS Contracts Database

Electronic State Business Daily Search

Solicitations/bids valued at $25,000 and more MUST be posted on the ESBD or the contract is considered VOID.

Search for opportunities either by agency or by Class and Item Code.
Use "Posted" for identifying current solicitations.
**ELECTRONIC STATE BUSINESS DAILY SEARCH**

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Agency Number</th>
<th>Status</th>
<th>Posting Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**RESULTS**

**Lab Reagents**

Solicitation ID: 3018-71-35951.1 | Due Date: 1/1/2018 | Due Time: 11:30 AM | Agency Number: 405 |
Status: Posted | Posting Date: 1/1/2018

**Underground Fuel Storage Tank Removal**

Solicitation ID: 4015-18-1-35585 | Due Date: 2/2/2018 | Due Time: 11:00 AM | Agency Number: 405 |
Status: Posted | Posting Date: 2/2/2018

**DESCRIPTION AND PRICING**

**PURCHASE OF THE FOLLOWING:**

The Department of Public Safety (DPS) solicits bids to remove and dispose of one 4,000 gallon underground storage tank (UST) and all associated piping, valves, pumps, and components.

The documents included in the IFB must be returned with the bid. Please utilize the enclosed Attachment C - Checklist to ensure the bid is complete.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DESCRIPTION</th>
<th>QUANTITY</th>
<th>UNIT</th>
<th>UNIT PRICE</th>
<th>EXTENSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Removal and Disposal of Underground Storage Tank as per statement of work (SOW)</td>
<td>1</td>
<td>ORB</td>
<td>$5</td>
<td>$</td>
</tr>
</tbody>
</table>

**Calendar of Events**

- 01/29/18 at 10:00AM
- 01/30/18 at 10:00AM
- 01/31/18 at 10:00AM
- 02/2/18 at 10:00AM

A mandatory pre-bid site visit will be held at 1108 South Columbia Parkway, TX 75032. Failure to attend the mandatory site visit will result in the disqualification of bidder's bid response.

**Point of Contact:**

Jerrin Rodriguez
Phone Number: 956-247-5059
E-Mail: Services.Bidруш@texas.gov

**SERVICE PERIOD:**

Services to be completed within 120 days and with DPH acceptance of project from Date of Award.

**SERVICE PERIOD WITH OPTIONS**

- Applicable
- Not Applicable

**BEST VALUE**

DPS may use the best value factors listed in Tex. Gov't Code § 216.007 in determining the lowest overall cost for this solicitation.
HUB Program

Opportunities are available through subcontracting opportunities through the HUB Subcontracting Plan

HUB Program

Agencies must evaluate each procurement opportunity with a value of $100,000 or more (includes renewals or any possible amendments) for probable subcontracting opportunities.
HUB Program

- If subcontracting opportunities are identified, a responsive and completed HUB Subcontracting Plan (HSP) MUST be provided with proposal. Any proposals not containing a responsive HSP will be rejected for material failure and will not be considered for a contract award.

HUB Program

All respondents (regardless of HUB status) must use one of these Good Faith Effort Requirement Methods if the agency requires a HSP:
- Solicitation
- Utilizing 100% HUBs for Subcontracting
- Meeting or Exceeding the HUB Goal on the Contract
- Self - Performing
HUB Program

• Solicitation Method:
  • Notify at least three currently Texas certified HUB per subcontracting opportunity, providing HUB at least 7 working days to respond (excluding the day the solicitation was sent, weekends, holidays and any other day the executive director has closed the agency (i.e. cold weather days));
  • Provide scope of work for HUB to determine whether they are interested to pursue;
  • Provide a location where the specifications are located (i.e. link to the posting on ESBD or a physical location, etc.), information regarding insurance and bonding requirements (if applicable); and
  • In addition, notify a minimum of two minority, women, trade organizations and/or business development centers providing the same information above as well as the same time frame for response.
  • A mentor may utilize a protégé from a state agency sponsored Mentor Protégé agreement for the subcontracting the protégé is able to provide. The M-P relationship may be utilized in lieu of additional soliciting to HUBs.

HUB Program

Utilizing 100% HUBs for all subcontracting Method:
The respondent indicates that all subcontracting will be done utilizing HUB vendors regardless of the utilization contract percentage.
HUB Program

Meeting or Exceeding the Contract's HUB Goal Method:

The respondent will meet or exceed the contract HUB goal (whichever is the highest, statewide or agency-specific) with HUB subcontractors the respondent has not utilized in a previous continuous contract for a period of five years or more.

HUB Program

Self-Performing:

The respondent is required to document in the HSP how they are able to provide all materials, supplies, equipment and services needed to perform the contract without subcontracting. The agency must review the proposal to ensure that this is a true statement.
HUB Program

Become Familiar on "How" the state procures supplies, equipment, materials, and services:

- Term Contracts (SmartBuy)
- Opportunities through the Co-op
- Department Information Resources Contracts (IT related purchases)
- Delegated Legal Authority
- RFP, RFI, RFO, IFB, etc..

https://comptroller.texas.gov/purchasing/resources.php

Procurement and contracting is a critical component of our states' ability to acquire the necessary goods and services to operate effectively. This includes understanding the procurement process, regulations, and best practices. The Comptroller's Office provides resources and tools to help state agencies and departments effectively manage their procurement activities.

Related Links:
- Procurement Overview
- Texas Procurement and Contract Management Guide, RFP
- Vendor Communications Policy for RFP
- All Texas Contracts
- DIR Contracts
- Contracts Development
- Bid Opportunities
- Delivery, Reimbursement and Invoicing
- Contract Management
- Contract Administration
- Need Help?

Information available on procurement methods the state utilizes in obtaining goods and services.
Purchasing

STATEWIDE CONTRACTS

The Comptroller's Commission on Procurement Division (CPD) develops statewide contracts for non-T
type contracts and services to streamline purchasing for state agencies, institutions of higher education 
and other state government entities.

Local governments and other cooperative purchasing program members can take advantage of the 
statewide term and other managed contracts, and TMAS contracts developed from federally procured 
contracts.

Contracted and service contracts developed by CPD are available through the T-SmartBuy portal or 
apurchased directly from contracted vendors.

Search Statewide Contracts

Search or browse through statewide contracts for non-T contracts and services.

Contract Development

The Comptroller's office performs purchasing operations and customer service on behalf of state 
agencies, universities and more than 1,300 Co-op members.

Contract Management

The Comptroller's Office is responsible for contract administration, reporting requirements, and vendor performance.

Procurement Oversight & Delegation

CAT-RAD is responsible for contracts with a value of $10 million or greater. Small contracts between $1,000,000 and $10 million where agencies are not required to obtain a contracted authority for 
purchases are subject to CAT-RAD approval.

Texas Multiple Award Schedules (TMAS)

TMAS contracts have been developed through contracts awarded by the federal government to any 
other governmental entities.

T-SmartBuy

State and local government purchases of goods and services can be made through T-SmartBuy.

Department of Information Resources (DIR)

Information Technology and Services contracts and software contracts are competitively awarded by 
DIR.

Existing contract schedules/contracts 
agencies use for purchasing

**COMPTROLLER.TEXAS.GOV**

- Statewide Contracts
  - Search Statewide Contracts
  - Contract Development
  - Contract Management
  - Contract Review & Delegation (CAT-RAD)
  - Texas Multiple Award Schedule (TMAS)
  - T-SmartBuy
  - Department of Information Resources (DIR)

- Procurement Resources
  - Statewide Procurement Outreach Team
  - Publications and Forms
  - NIGP Commodity Book
  - Search for CMUBL/HUB Vendors
  - Statutes and Procedures
  - Grant Management

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  - Vendor Information Center
  - Centralized Master Bidders List (CMBL)
  - Historically Underutilized Business (HUB)
  - Modify CMUBL/HUB Profile
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  - State Travel Management
  - State Mail Services
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- Training and Certification
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  - Contract Manager (CTCM)
  - Directory of Active Certifications
  - Continuing Education and Events
  - Webinar Training for Governing Bodies
  - SB1681

**Related Links**

- Purchasing
- Texas Procurement and Contract Management 
  Guide (TPM)
- Vendor Communications Policy
- All Vendors (Contract)
- CMUBL Information
- Contractor Development
- StateProcurement
- Outreach Zones and Events
- Contractor Services
- State Mail Services
- SB1681

**Need Help?**

[Icon of a person with a light bulb]
HUB Program

Use historical data to identify:
- Procurement opportunities for your company
- Purchasing trends for agencies
- Current vendors providing goods and services
Purchasing

HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PROGRAM

State agencies and universities are constantly looking to work with businesses certified as Historically Underutilized Business (HUB). The goal of this good-faith effort is to actively involve HUBs in the Texas procurement process and ensure they receive a fair share of state business.

View a list of HUB status codes and ethnicity codes.

- Who qualifies to be a Historically Underutilized Business?
- What are the benefits of HUB Certification?
- How do I sign up?

IMPORTANT: It is vital to be truthful in all documents provided for HUB certification. It is a state jail felony under Texas Penal Code §37.10 to knowingly provide false information in an application for HUB certification. It is a third degree felony under Texas Government Code §52161.231 to apply for a state contract as a HUB vendor knowing you are not actually a HUB.

If the felony conduct prohibited under Texas Government Code §52161.231 results in the awarding of a state contract, then the act of knowingly acquiring funds derived from that felony conduct may be prosecuted under Texas Penal Code §34.02. An offense under this section is punishable as a felony regardless of the amount of funds derived from the illegal conduct. First degree felony punishment applicable if the value of the raised funds is $200,000 or more.

HUB FORMS

- HUB Certification Application Forms
- HUB Certification Checklists by Type
- HUB Subcontracting Plan (HSP) Forms
- HUB Merchant Verification Forms for State Charge Card Program
- Mentor Protégé Forms

HUB Publications

HUB Reports
HUB Brochure (PDF)
Grow Your Business (PDF)
Disparity Study

IMPORTANT: It is vital to be truthful in all documents provided for HUB certification. It is a state jail felony under Texas Penal Code §37.10 to knowingly provide false information in an application for HUB certification. It is a third degree felony under Texas Government Code §52161.231 to apply for a state contract as a HUB vendor knowing you are not actually a HUB.
Purchasing

HISTORICALLY UNDERUTILIZED BUSINESS REPORTING

The Statewide Support Services Division (SSSD) Historically Underutilized Business (HUB) Program has been tasked with the reporting of expenditures made by state agencies and institutions of higher education.

To accomplish this task, SSSD is committed to providing this information semi-annually (September 1 - February 28) and annually (September 1 - August 31).

How does the HUB Report assist Vendors?

The HUB Report is not limited to state agencies and institutions of higher education. The information within the report can also be used by vendors and the public to determine where state agencies purchase products or services. Once this has been identified, vendors can contact that agency's HUB Coordinator to introduce their business and further understand state procurement.

HUB Reports

2017
• Fiscal Year 2017 Annual HUB Report
• Fiscal Year 2017 Semi-annual HUB Report

2016
• Fiscal Year 2016 Annual HUB Report
• Fiscal Year 2016 Semi-annual HUB Report

2015
• Fiscal Year 2015 Annual HUB Report
• Fiscal Year 2015 Semi-annual HUB Report

5 Years of Data Available

2014
• Fiscal Year 2014 Annual HUB Report
• Fiscal Year 2014 Semi-annual HUB Report

2013
• Fiscal Year 2013 Annual HUB Report
• Fiscal Year 2013 Semi-annual HUB Report

Purchasing

FISCAL YEAR 2017 ANNUAL HUB REPORT

I. Executive Letter and Executive Summary
II. Statewide Totals: TXT or PDF
III. Statewide Analysis of Awards:
This section includes a statewide analysis of the following:
• Total Statewide Awards and Awards to Certified HUBs by Ethnicity/Gender: TXT or PDF
• Awards to Certified HUBs by Procurement Categories and Object Codes: TXT or PDF
• Awards to Certified HUBs by Procurement Object Codes: TXT or PDF
• Awards to Certified HUBs: Detail by Object Code

IV. State Agency Rankings
This section includes the following rankings:
• Top Fifty (50) Agencies by Total Expenditures (PDF)
• Twenty-five (25) Agencies Spending More than $5 Million with Largest Percentage Spent with HUBs (PDF)
• Twenty-five (25) Agencies Spending More than $5 Million with Smallest Percentage Spent with HUBs (PDF)
• State Agencies Spending $0 with HUBs (PDF)

Object Codes are financial codes the state utilizes to identify types of contracts - Financial Chart of Accounts
Purchasing

FISCAL YEAR 2017 ANNUAL HUB REPORT

Detail by Object Code

7204 Insurance Premiums and Deductibles
7205 Employee Bonds
7295 Service Fee Paid to the Lottery Operator
7211 Awards
7216 Insurance Premiums (Approved by Board of Insurance & Attorney General)
7218 Publications
7239 Consultant Services (Approved by Office of the Governor)
7240 Consultant Services (Other)
7242 Consultant Services (Computer)
7243 Educational/Training Services
7245 Financial and Accounting Services (64)
7246 Medical Services (09)
7247 Veterinary Services
7253 Other Professional Services
7255 Investment Counseling Services
7256 Architectural/Engineering Services (05)
7257 Legal Services (Approval by the State Office of Administrative Hearing)

HUB Program

- The report indicates the agencies spend by the Object Code (COBJ) and is listed by the most spent
- Document the agencies that spend the most in your area
- The agency code (blue text) indicates there is more data linked to the COBJ
- Pressing the agency code will direct you to the detail expenditures for the agency
- You are able to identify what vendors were use for providing the goods or services
Purchasing

Texas controller of public accounts

Object code report for FY17
Object code 7256 - architectural/engineering services (05)

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Total Amount / %</th>
<th>Total Sub Amount / %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Texas Dept of Trans</td>
<td>506,906,906.10 (71.20%)</td>
<td>$19,999,999.99 (7.82%)</td>
</tr>
<tr>
<td>Texas A&amp;M University</td>
<td>64,631,641.48 (9.20%)</td>
<td>$2,631,641.48 (1.03%)</td>
</tr>
<tr>
<td>University of Texas Med</td>
<td>61,000,000.00 (8.70%)</td>
<td>$1,000,000.00 (0.40%)</td>
</tr>
<tr>
<td>University of Texas Sys</td>
<td>43,947,422.22 (6.50%)</td>
<td>$1,321,422.22 (0.53%)</td>
</tr>
<tr>
<td>Texas State Technical Col</td>
<td>19,161,849.69 (2.70%)</td>
<td>$1,849,69 (0.70%)</td>
</tr>
<tr>
<td>General Land Office</td>
<td>10,050,000.00 (1.40%)</td>
<td>$1,000,000.00 (0.40%)</td>
</tr>
<tr>
<td>UT MD Anderson Cancer Cen</td>
<td>1,423,109.00 (0.20%)</td>
<td>$4,231,09.00 (0.16%)</td>
</tr>
<tr>
<td>Texas State University</td>
<td>10,050,000.00 (1.40%)</td>
<td>$1,000,000.00 (0.40%)</td>
</tr>
<tr>
<td>Lamar University - Beaumont</td>
<td>5,178,894.00 (0.70%)</td>
<td>$1,178,894.00 (0.40%)</td>
</tr>
<tr>
<td>Texas Comm. on Environment</td>
<td>4,557,614.92 (0.60%)</td>
<td>$4,557,614.92 (0.18%)</td>
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<tr>
<td>Texas Facilities Comm</td>
<td>2,937,613.20 (0.30%)</td>
<td>$763,937.61 (0.30%)</td>
</tr>
</tbody>
</table>
HUB Program

- Review and document the historical expenditure data and identify vendors that are receiving the business
- Go to the CMBL database and look up their vendor profiles to see what class and item codes they have listed in their profiles
- "Are you missing out on notifications or info?"
- "Are you registered for the CMBL?"

HUB Program

More valuable historical information.....
(prices, contract duration, contact information, contract terms and condition, etc).....is available at www.lbb.state.tx.us
LBB Contracts Database Archive

As Reported by State Agencies August 15, 2015

Note - Archive database provides data for contracts prior to September 1, 2013.

Search Tool
Search for documents based on combination of document type, fiscal year, agency, vendor and value

Document Type: [Contract] Fiscal Year: [Select from list]

Agency
Agency: [Agency Search]
Select From List
Only agencies with contracts on file are available to search.

Vendor
Vendor: [Vendor Search]
Select From List

"Show Me the Money"

• All forms of government have a pre approved budget
• Research budgets to identify funds allocated for opportunities
**HUB Program**

**Bottom Line: Know your market**

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HUB Program

Laura Cagle-Hinojosa
Statewide HUB Program Manager
Laura.Cagle-Hinojosa@cpa.texas.gov
512-463-4583
888-863-5881
Laura Cagle-Hinojosa started her career with the State of Texas in 1994 as a contracts analyst for the Texas Department of Mental Health and Mental Retardation's Construction Program. It was during this time (1993), Ms. Hinojosa was assigned to implement the Historically Underutilized Business Program (HUB) at the agency.

In 2004 Laura was recruited by JBCore industry and held the position as the Multicultural Business Development Manager for the Southwest United States for IC! and during her 2.5 years in this position, helped small minority and women-owned businesses obtain over $50 million in government contracts. Many of the tools and techniques developed from evaluating opportunities from a contractor/vendor's perspective are reflected in this workshop.

Laura returned to state government in 2007 as a procurement policy writer for the Department of Aging and Disabilities Services and in 2009 promoted the position of HUB Program Coordinator for Texas Commission on Environmental Quality (TCEQ) where she oversees the HUB and ERB DBE program for the agency. Under Laura’s management, TCEQ received a national award from the Environmental Protection Agency (EPA) in Washington D.C. in June 2014 for the agency’s small business program.

Ms. Hinojosa obtained the position of Statewide HUB Program Manager at the Texas Comptroller of Public Accounts in March 2017. Statewide Procurement Division. This position is responsible for HUB Certification, promulgation of HUB administrative rules, outreach and educative vendors to the HUB Program. Laura has been involved in the HUB program in one capacity or another from the program’s inception and continues to be an advocate for small businesses.